

HRIS – Human Resources Information Solution

# **RESOURCE GUIDE:** **AGENCY TRANSIT CARD**



# AGENCY TRANSIT CARD

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# Transit Card Maintenance

## Platinum Pass Program

Capitol Rideshare provides a subsidy to State employees, who reside in Maricopa County and, who commute to work using a Valley Metro bus or the light rail. The employee completes the **GAO-624 Platinum Pass Application and Payroll Deduction Authorization** to obtain their initial card and any subsequent replacement cards (if original is lost, stolen or damaged). Eligible rides are tracked using the Platinum Pass card. The initial card is free and the fare is deducted on a pre-tax basis from the employee’s paycheck in the following month.

## Process Overview

1. Employee Completes Platinum Pass application
2. Application processed by Agency Transit Card processor
3. Transit card mailed to employee’s home address by Arizona Department of Administration – General Accounting Office (GAO)

**Note: GAO-624 Platinum Pass Application must be signed by employee before Transit Card can be issued or replaced. The application is retained by the agency.**

# Assign a New Transit Card AZ10.1

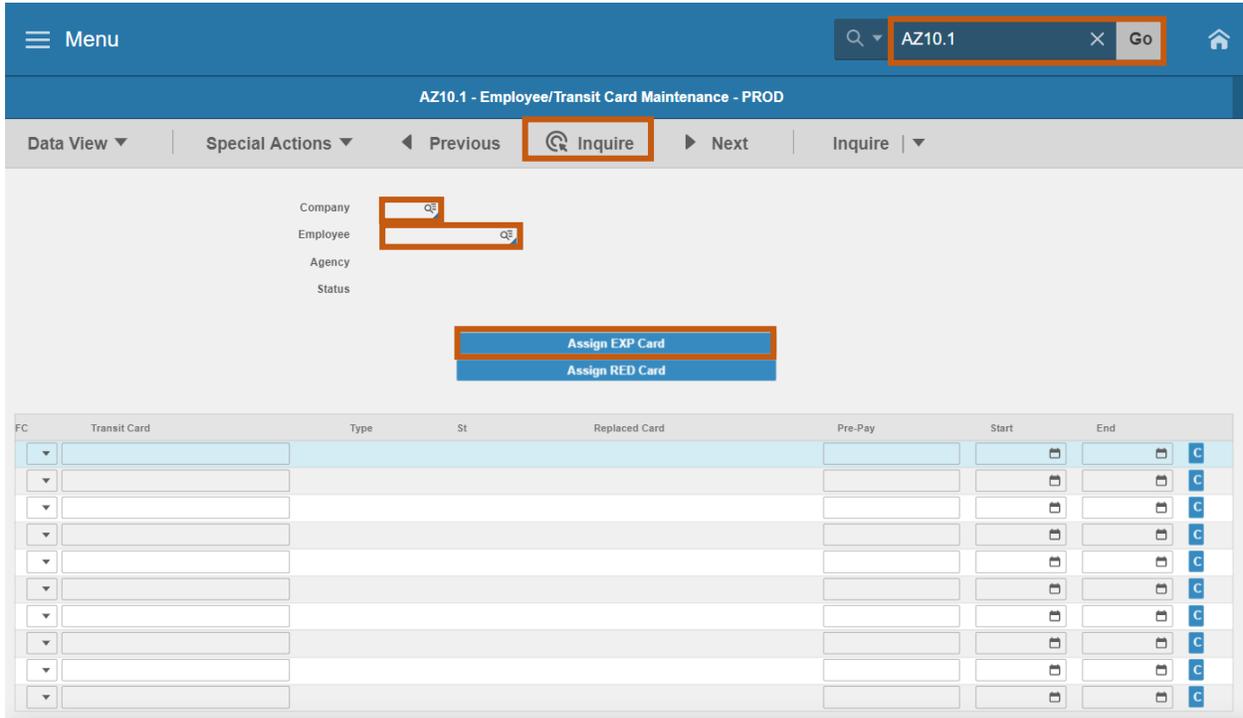
## Field Descriptions

HRIS screen **AZ10.1 Employee/Transit Card Maintenance** displays an employee’s Transit Card history and is used to assign a new Transit Card or cancel an existing Transit Card. The most recent Transit Card assigned is displayed in row 1.

HRIS Field	Description
<b>Type</b>	Card Type. (E) Express Card is the only type of card issued by the State
<b>St</b>	Card Status: <b>A</b> Active <b>D</b> Final Billing Requested <b>G</b> Inactivated by GAO Central Payroll <b>I</b> Inactive
<b>Replaced Card</b>	Previous Card that had billing linked to the new Transit Card
<b>Pre-Pay</b>	Amount entered was paid by the employee outside of the normal monthly billing cycle or amount is pending as a one-time deduction to be taken from the employee’s paycheck
<b>Start/End Dates</b>	Start Date – Date Transit Card is Issued End Date – Date Transit Card is Canceled

## Issue a Transit Card

An employee can request a Transit Card by completing the Form **GAO-624** and submitting it to their Agency Transit Card liaison. The agency reviews the GAO-624 for completeness and processes the request using the AZ10.1 screen in the HRIS. GAO Central Payroll mails the card to the employee’s Home Address in HRIS during weekly processing.



The screenshot shows the HRIS interface for 'AZ10.1 - Employee/Transit Card Maintenance - PROD'. At the top, there is a search bar with 'AZ10.1' entered and a 'Go' button. Below the search bar, there are navigation buttons: 'Data View', 'Special Actions', 'Previous', 'Inquire' (highlighted with an orange box), 'Next', and 'Inquire'. Underneath, there are input fields for 'Company', 'Employee', 'Agency', and 'Status'. The 'Company' and 'Employee' fields are highlighted with orange boxes. Below these fields are two buttons: 'Assign EXP Card' and 'Assign RED Card', both highlighted with orange boxes. At the bottom, there is a table with the following columns: FC, Transit Card, Type, St, Replaced Card, Pre-Pay, Start, and End. The table contains several rows of data, with the first row highlighted in light blue.

FC	Transit Card	Type	St	Replaced Card	Pre-Pay	Start	End

1. Type **AZ10.1** in search field, click **Go**
2. **Company**: Type or select **1**
3. **Employee**: Type or select the **Employee Identification Number**
4. Click **Inquire**
5. Click **Assign EXP Card**

*If Assign EXP Card is not available, the employee has an active card displayed in the first row. Proceed to Issue Replacement Transit Card section of training guide*

6. Sub-form **AZ10.4** displays

**Sub-form AZ10.4**



Menu AZ10.1 Go Home

AZ10.4 - Assign New EXP Transit Card +

OK Cancel Detach

Company 1 STATE OF ARIZONA  
 Employee 195000 JIM HALPERT  
 Transit Card 123456789 Type E EXP - Local/Express/RAPID/Rail  
 Control Nbr 49598  
 Start Date 12/11/2019 End Date

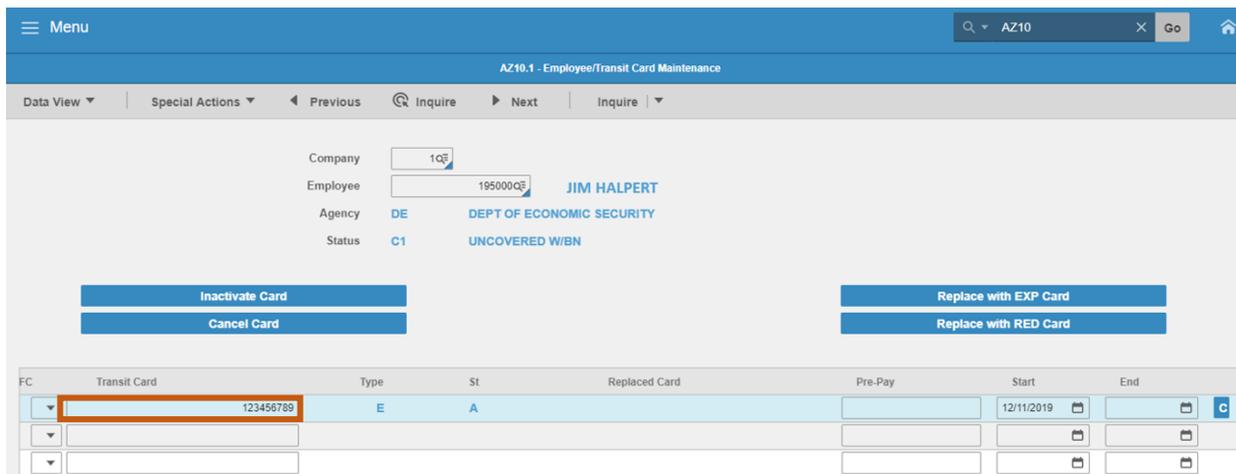
7. Click **OK** to Assign the Transit Card

**OR**

8. Click **Cancel** to return to AZ10.1

- The Transit Card will not be issued if you click **Cancel**

Transit Card successfully issued displays on AZ10.1.



Menu AZ10 Go Home

AZ10.1 - Employee/Transit Card Maintenance

Data View Special Actions Previous Inquire Next Inquire

Company 1QE  
 Employee 195000QE JIM HALPERT  
 Agency DE DEPT OF ECONOMIC SECURITY  
 Status C1 UNCOVERED W/BN

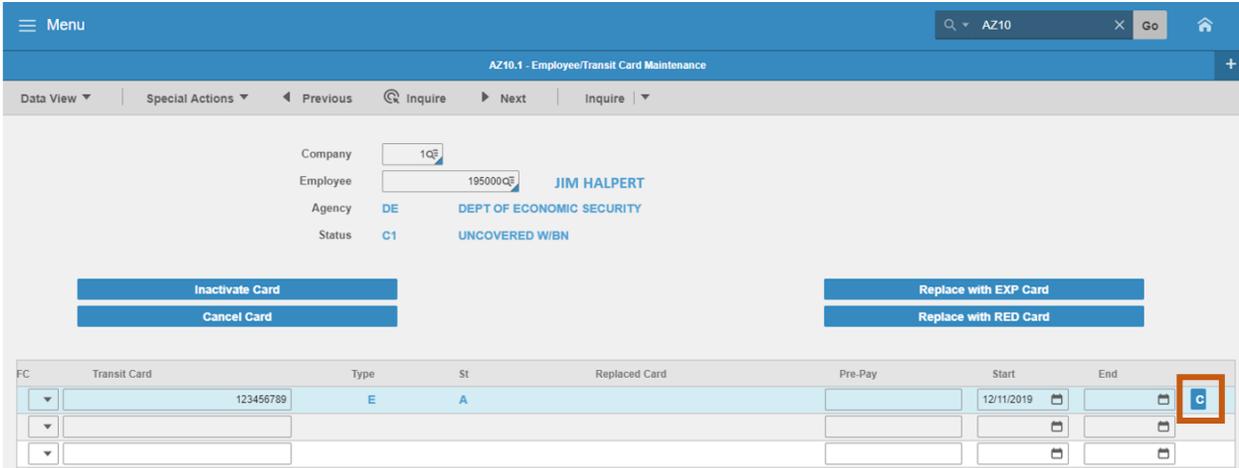
Inactivate Card Cancel Card Replace with EXP Card Replace with RED Card

FC	Transit Card	Type	St	Replaced Card	Pre-Pay	Start	End
	123456789	E	A			12/11/2019	

**Note: If a Transit Card is assigned in error contact GAO Central Payroll the 'same business day'. GAO may be able to reverse the action.**

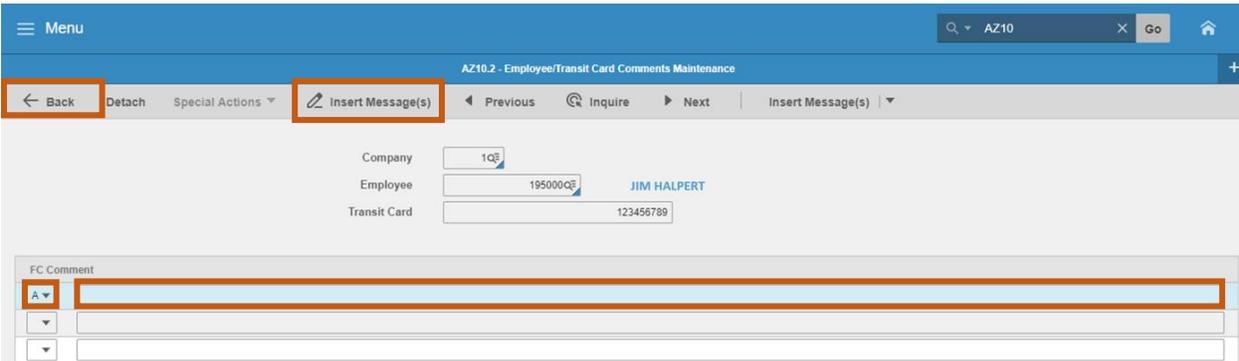
## Employee/Transit Card Comments Maintenance AZ10.2

Adding Comments to the Transit Card is optional. To add comments or view comments, follow the steps below.



FC	Transit Card	Type	St	Replaced Card	Pre-Pay	Start	End
▼	123456789	E	A			12/11/2019	
▼							
▼							

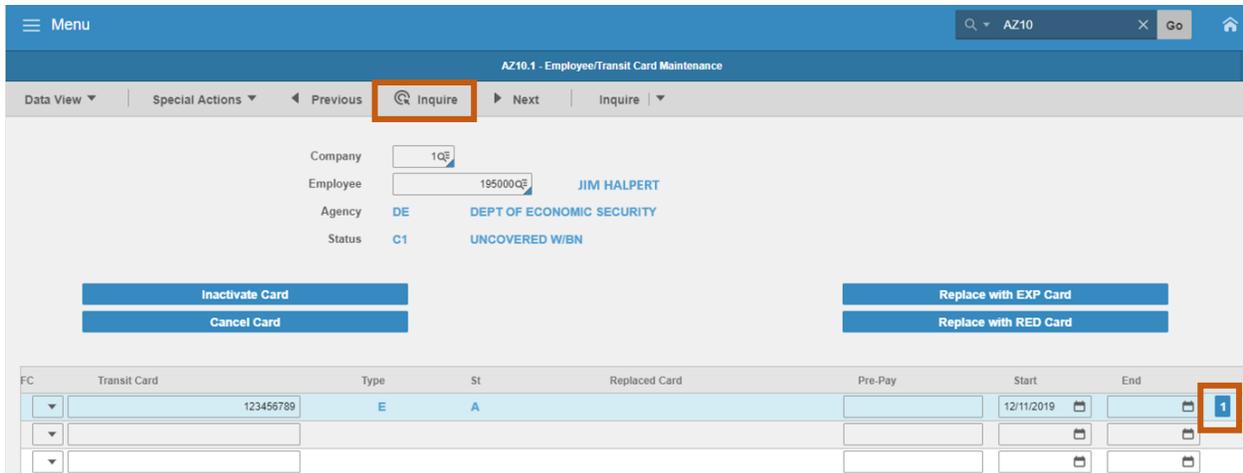
1. On the **AZ10.1** click **C**
2. The **AZ10.2 Employee/Transit Card Comments Maintenance** screen displays



FC Comment	Comment
A ▼	
▼	
▼	

Comments are optional. To add a new comment:

3. **FC:** Type or select **A**
4. **Comment:** Type in comment
5. Click **Insert Message(s)**. Status bar displays message **Change Complete – Continue**
6. Click **Back** to return to **AZ10.1**

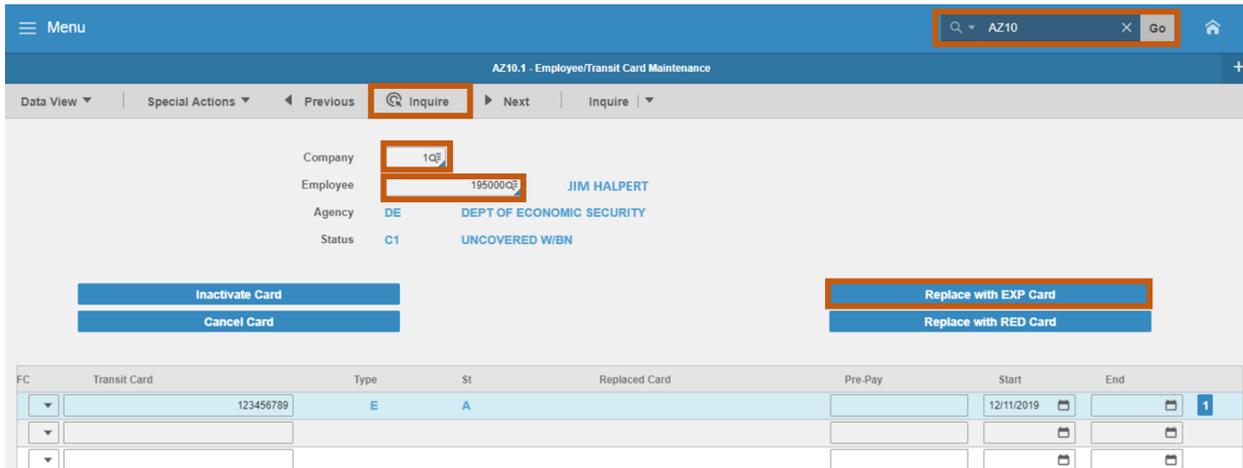


7. Click **Inquire**

- The Comments box now displays a numerical value of **1** instead of **C** indicating comments exist

## Issue Replacement Transit Card AZ10.1

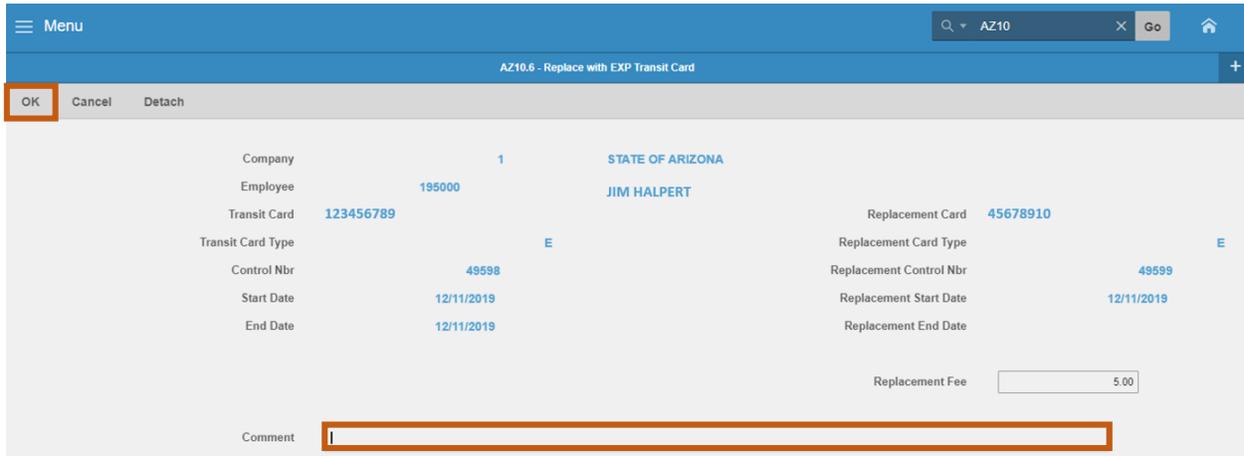
An employee can request a new card by completing the **GAO-624** form and selecting the **Replacement** box.



1. Type **AZ10.1** in search field, click **Go**
2. **Company:** Type or select **1**
3. **Employee:** Type or select the **Employee Identification Number**
4. Click **Inquire**
5. Click **Replace with EXP Card**

**Note:** If **Replace with EXP Card** is not available, the employee does not have an active card. Proceed to **Assign a New Transit Card** section of training guide.

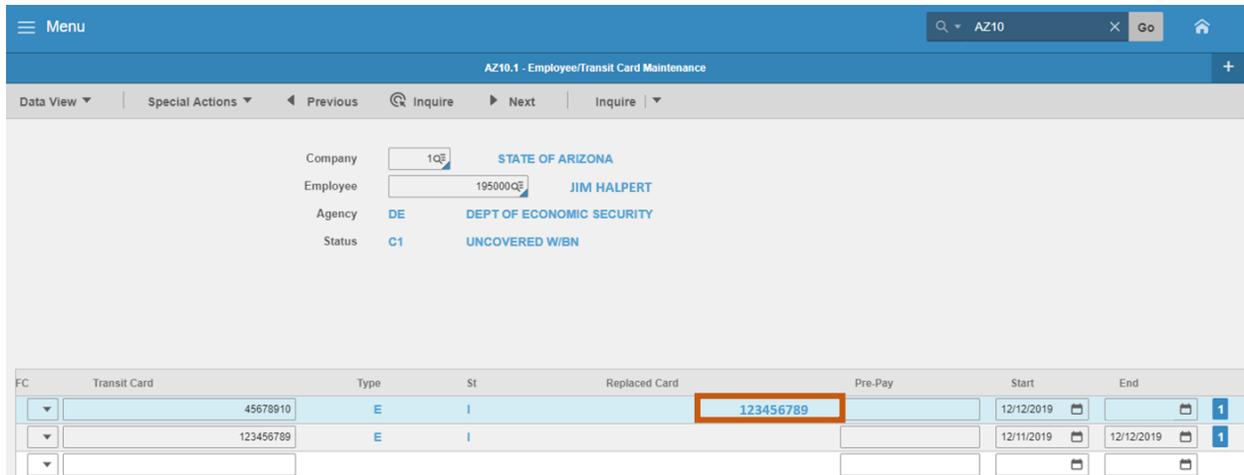
Sub-form **AZ10.6 Replace with EXP Transit Card** displays.



Company 1 STATE OF ARIZONA  
 Employee 195000 JIM HALPERT  
 Transit Card 123456789 Replacement Card 45678910  
 Transit Card Type E Replacement Card Type E  
 Control Nbr 49598 Replacement Control Nbr 49599  
 Start Date 12/11/2019 Replacement Start Date 12/11/2019  
 End Date 12/11/2019 Replacement End Date  
 Replacement Fee 5.00  
 Comment

6. **Comment:** Leave blank or type a **comment**
  7. Click **OK** to Replace the Transit Card
- OR**
8. Click **Cancel** to return to **AZ10.1** without issuing a replacement

**Note: A replacement fee of \$5 will be deducted from the employee’s next paycheck and will appear as deduction code 3513 – BUS CARD – REISSUE – EE.**



Company 10E STATE OF ARIZONA  
 Employee 195000QE JIM HALPERT  
 Agency DE DEPT OF ECONOMIC SECURITY  
 Status C1 UNCOVERED W/BN

FC	Transit Card	Type	St	Replaced Card	Pre-Pay	Start	End
	45678910	E	I	123456789		12/12/2019	
	123456789	E	I			12/11/2019	12/12/2019

The Replacement action end dated the old card and issued a new card. The old card number is displayed in the **Replaced Card** column in row 1. The cards are linked together for billing purposes.

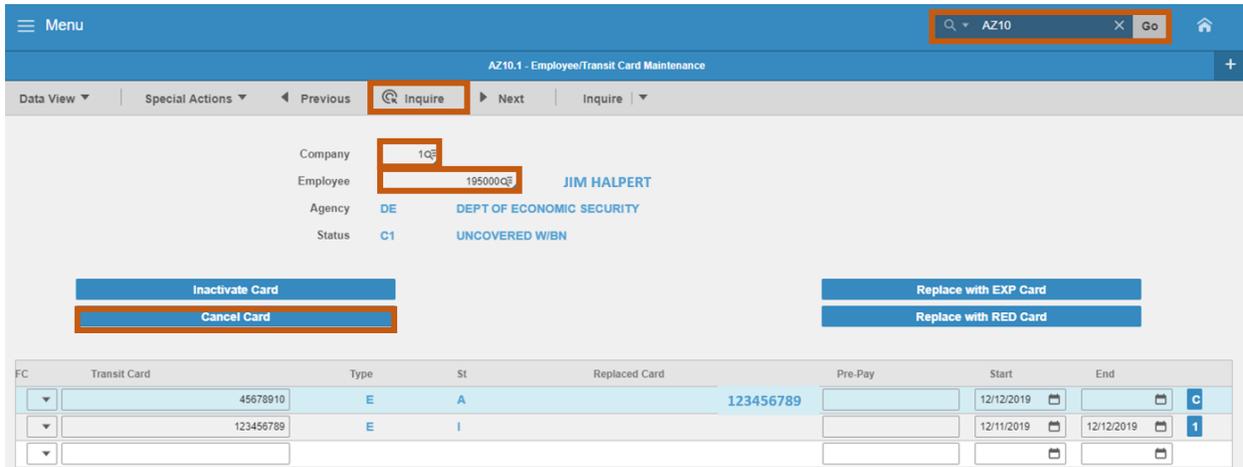
**Note: If a Transit Card is replaced in error contact GAO Central Payroll ‘the same business day’. GAO may be able to reverse the action.**

## Cancel Transit Card (No replacement) AZ10.1

Use the **AZ10.1** to cancel a Transit Card at the request of an employee. A card must be canceled when an employee is leaving State service. Transit cards are considered State property and must be returned at separation.

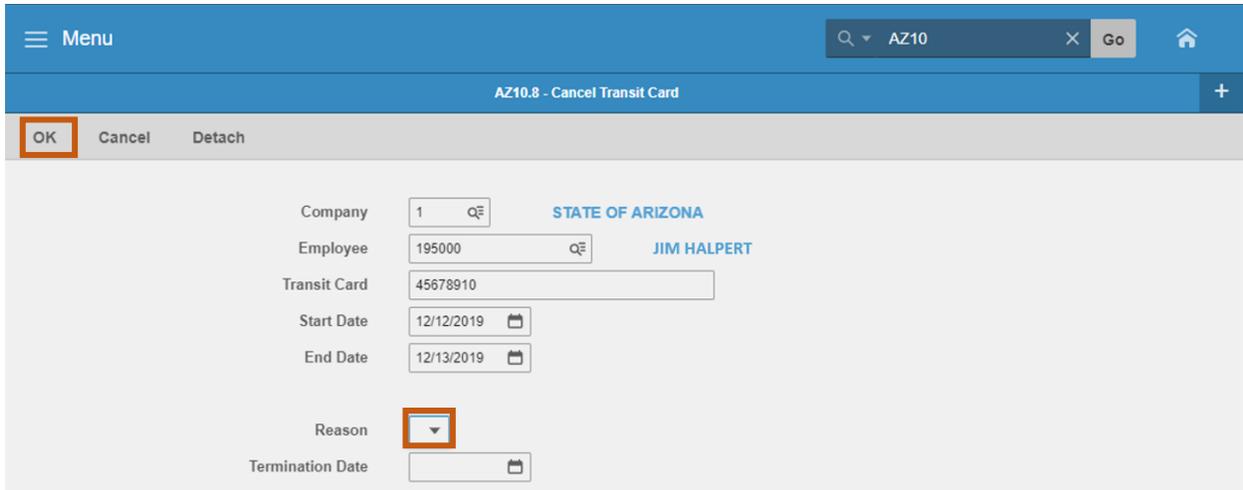
**Do not cancel a card if the employee is transferring to another State agency.**

The card will transfer with them to their new agency.



FC	Transit Card	Type	St	Replaced Card	Pre-Pay	Start	End
	45678910	E	A	123456789		12/12/2019	
	123456789	E	I			12/11/2019	12/12/2019

1. Type **AZ10.1** in search field, click **Go**
2. **Company:** Type or select **1**
3. **Employee:** Type or select the **Employee Identification Number**
4. Click **Inquire**
5. Click **Cancel Card**
  - Sub-form **AZ10.8 Cancel Transit Card** screen displays



The screenshot shows a web application interface for canceling a transit card. At the top, there is a blue navigation bar with a 'Menu' icon, a search bar containing 'AZ10', and a 'Go' button. Below this is a header bar with the title 'AZ10.8 - Cancel Transit Card' and a plus sign. The main form area has a light gray background and contains several input fields: 'Company' (value: 1), 'Employee' (value: 195000), 'Transit Card' (value: 45678910), 'Start Date' (value: 12/12/2019), and 'End Date' (value: 12/13/2019). To the right of these fields, the text 'STATE OF ARIZONA' and 'JIM HALPERT' is displayed. Below the date fields is a 'Reason' dropdown menu, which is highlighted with a red box. At the bottom, there is a 'Termination Date' field. At the top left of the form area, there are three buttons: 'OK' (highlighted with a red box), 'Cancel', and 'Detach'.

6. **End Date:** Leave as current date or select a future date. The End Date represents the last day an employee can use the Transit Card.
  - Defaults to current date
  - **Do NOT** use a date in the past
  - **Do NOT** use a Saturday, Sunday or State Holiday Date

7. Select the **Reason** card is being canceled:

Reason	Description
<b>L - Lost Card</b>	Transit Card was lost, or Employee wants to cancel a card without a replacement
<b>S - Stolen Card</b>	Transit Card was stolen
<b>F - Left State Service</b>	Employee left State service and <b>already received</b> their final paycheck
<b>G - Damaged</b>	Transit Card was damaged or is not recognized by bus reader
<b>D - Final Billing</b>	Employee is leaving State service and needs current month charges taken from the final paycheck  This option initiates a request to the Transit Card to vendor to provide current usage charges outside of the normal monthly billing cycle

8. **Termination Date:** select Employee’s last day of work
  - Required if the Reason **D Final Billing** is selected
  - Leave blank if any reason other than D is selected
9. Click **OK** to cancel the card

**OR**

10. Click **Cancel** to keep the card active and return to the AZ10.1

Menu
AZ10

AZ10.1 - Employee/Transit Card Maintenance

Data View | Special Actions | Previous | Inquire | Next | Inquire

Company	1QE	STATE OF ARIZONA
Employee	195000QE	JIM HALPERT
Agency	DE	DEPT OF ECONOMIC SECURITY
Status	C1	UNCOVERED W/BN

FC	Transit Card	Type	St	Replaced Card	Pre-Pay	Start	End
<input type="button" value="v"/>	45678910	E	I	123456789	<input type="text"/>	12/12/2019 <input type="button" value="c"/>	12/13/2019 <input type="button" value="c"/>
<input type="button" value="v"/>	123456789	E	I		<input type="text"/>	12/11/2019 <input type="button" value="c"/>	12/12/2019 <input type="button" value="c"/>
<input type="button" value="v"/>					<input type="text"/>	<input type="button" value="c"/>	<input type="button" value="c"/>

End Date is now populated. The **Cancel action** creates a comment containing the user ID and the Reason selected on AZ10.8. View comments generated by clicking the comment box.

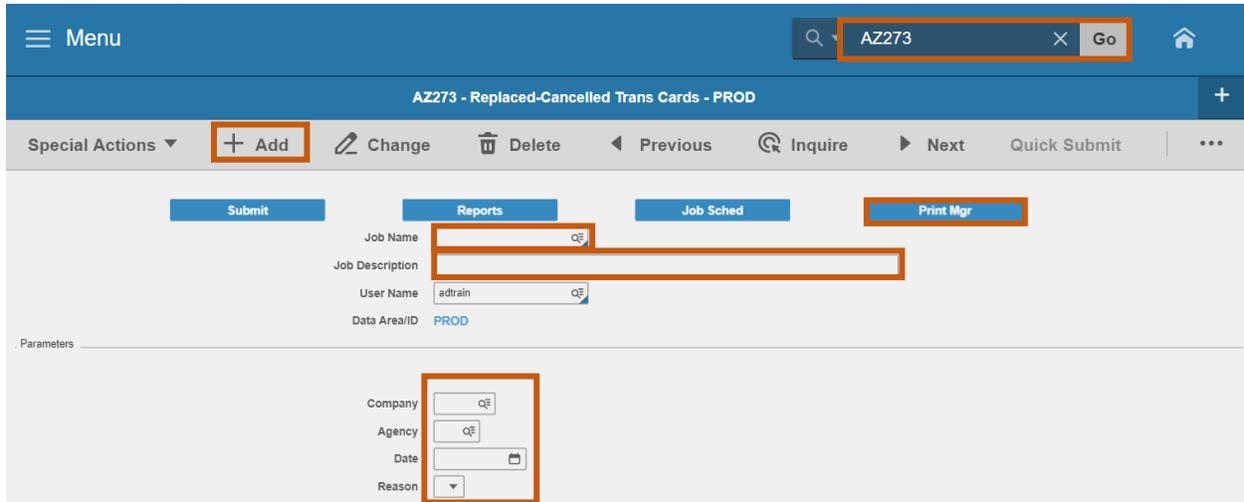
**Note: If a Transit Card is canceled in error contact GAO Central Payroll the same business day. GAO may be able to reverse the action.**

## Transit Card Reports

### Replaced Canceled Transit Cards Report AZ273

Use the **Replaced-Canceled Trans Cards (AZ273)** report to create a register of all replaced and canceled Transit Cards for a specific agency, date, and/or reason code. This report is used by GAO to transmit a log of canceled Transit Cards to the vendor for deactivation and final usage details. The report also includes Transit Cards that will be linked together.

#### Create Report Parameters



The screenshot shows the 'AZ273 - Replaced-Canceled Trans Cards - PROD' report configuration screen. At the top, a search bar contains 'AZ273' and a 'Go' button. Below the search bar is a toolbar with 'Special Actions', '+ Add', 'Change', 'Delete', 'Previous', 'Inquire', 'Next', and 'Quick Submit'. The main form area has four tabs: 'Submit', 'Reports', 'Job Sched', and 'Print Mgr'. The 'Reports' tab is active, showing fields for 'Job Name', 'Job Description', 'User Name' (with 'adtrain' entered), and 'Data Area/ID' (with 'PROD' selected). Below these are fields for 'Company', 'Agency', 'Date', and 'Reason'. The 'Add' button in the toolbar and the 'Job Name' and 'Company' fields are highlighted with orange boxes.

1. Type **AZ273** in search field, click **Go**
2. **Job Name:** Type a unique name for the report
3. **Job Description:** Type a detailed description of the report
4. **Company:** Type or select **1**
5. **Agency:** Type or select the two-digit **Agency Code**
6. **Date:** Select **Date** the Transit Cards were **replaced/canceled**
7. **Reason:** Leave blank or select a **Reason** to limit results
8. Click **Add** to save report parameters. Status bar displays message **Job Added**

## Submit Report

**AZ273 - Replaced-Cancelled Trans Cards - PROD**

Special Actions ▾   + Add    Change    Delete   ◀ Previous    Inquire   ▶ Next   Quick Submit

Submit
Reports
Job Sched
Print Mgr

Job Name

Job Description

User Name

Data Area/ID **PROD**

1. Click **Quick Submit**, status bar displays message **Job has been submitted**
2. Click **Print Mgr** to view the report results in your Print Manager

For additional instructions on how to view reports, see the 'Agency HRIS Intro Training for On Demand Reports'.

## Example of Report Results

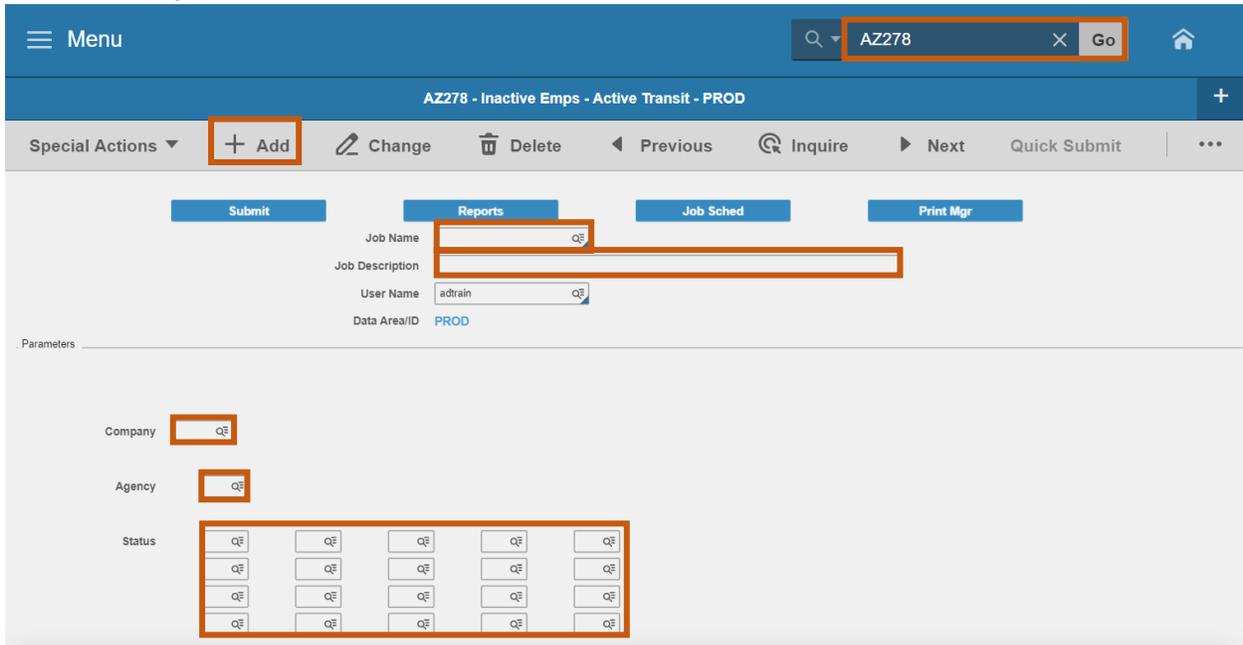
Replaced-Cancelled Trans Cards							Page 1
AZ273 Date 06/17/19 Time 18:39							
Replaced-Cancelled Trans Cards							
Company: 1 STATE OF ARIZONA							
Employee	Name	Old Card	New Card	Tran Date	Reason	Proc Level	Dept
123456	RACHEL GREEN	1234567899		06/17/19	Dismissal	DC22J	22J30
234567	JOEY TRIBBIANI	546134864848		06/17/19	Dismissal	DE2C0	2C620
345678	ROSS GELLER	871354685		06/17/19	Dismissal	DE2E0	2E610
456789	PHOEBE BUFFAY	8746456456		06/17/19	Dismissal	DE621	62160
5678910	CHANDLER BING	6434856483586	3586445554	06/17/19	Inactive	DT610	06004
Totals:							
		EXP	RED			Total	
	Total Inactive:	2	0			2	
	Total Dismissal:	4	0			4	
	Total Inactivated by GAO:	0	0			0	
	<b>Total:</b>	<b>6</b>	<b>0</b>			<b>6</b>	

## Inactive Employees with Active Transit Cards Report AZ278

Use the **Inactive Emps – Active Transit (AZ278)** report to view employees in a selected status that have Active Transit Cards.

**Required agency action: Cancel the cards on AZ10.1 to prevent further charges from incurring and becoming 100% chargeable to the Agency.**

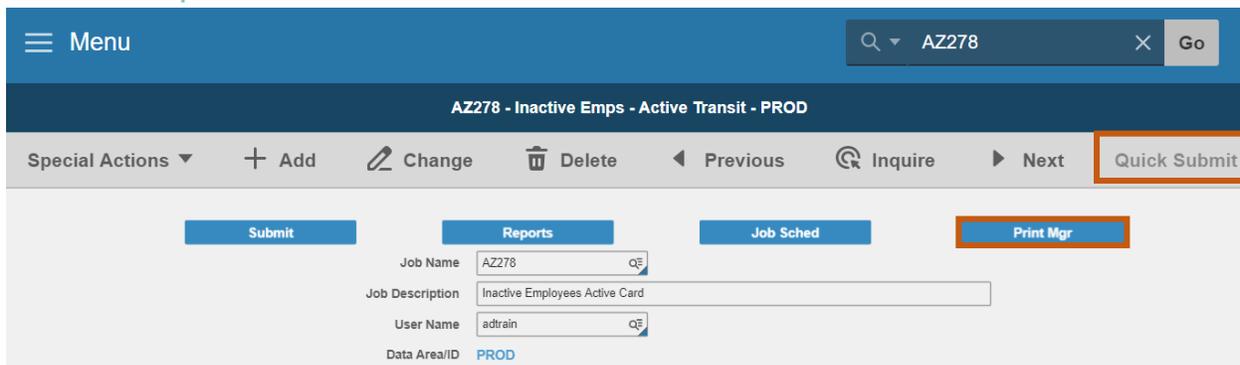
### Create Report Parameters



The screenshot shows the 'AZ278 - Inactive Emps - Active Transit - PROD' report creation screen. At the top, a search bar contains 'AZ278' and a 'Go' button. Below the search bar is a navigation bar with 'Special Actions', '+ Add', 'Change', 'Delete', 'Previous', 'Inquire', 'Next', and 'Quick Submit'. The main form area has a 'Submit' button and a 'Reports' section with the following fields: 'Job Name' (empty), 'Job Description' (empty), 'User Name' (adrain), and 'Data Area/ID' (PROD). Below the 'Reports' section is a 'Parameters' section with 'Company' (empty), 'Agency' (empty), and a 'Status' section containing a grid of 20 status options (T1, T2, R1, R2, R3, U1, U2, L4, L5, M2, M3, W2, W3).

1. Type **AZ278** in search field, click **Go**
2. **Job Name:** Type a unique name for the report
3. **Job Description:** Type a detailed description of the report
4. **Company:** Type or select **1**
5. **Agency:** Type or select the two-digit **Agency Code**
6. **Status:** Select **Pending Termination** or **Final Termination Status**
  - Recommended Status: T1, T2, R1, R2, R3, U1, U2, L4, L5, M2, M3, W2, W3
7. Click **Add** to save report parameters. Status bar displays message **Job Added**

## Submit Report



1. Click **Quick Submit**, status bar displays message **Job has been submitted**
2. Click **Print Mgr** to view the report results in your Print Manager

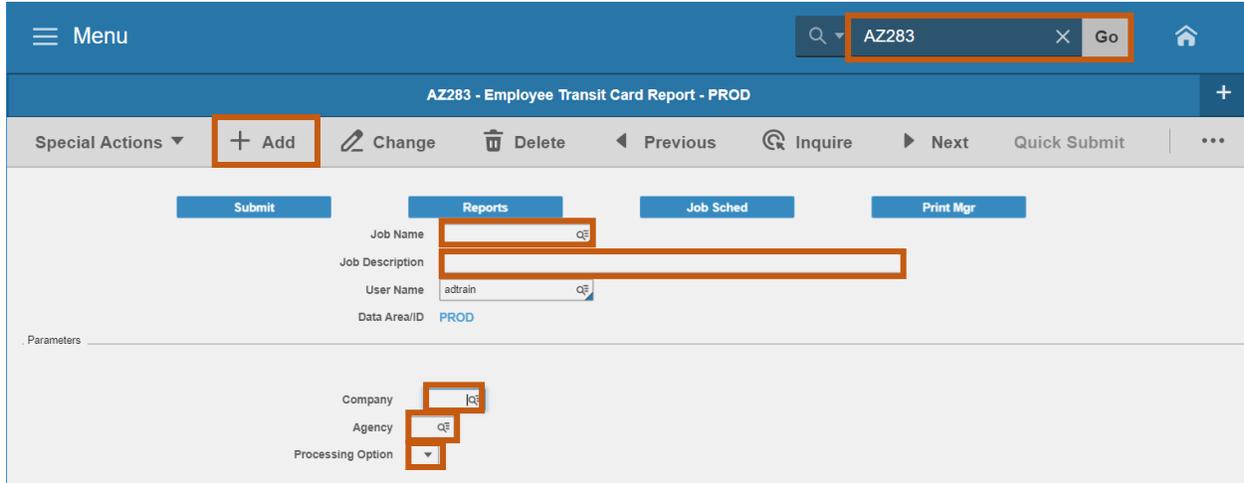
## Example of Report Results

Inactive Emps - Active Transit				
AZ278 Date 08/24/18 Time 18:41		Inactive Employees with Active Transit Cards		
Employee	Status	Transit Card	Department	Process Level
-----	---	-----	-----	-----
124211 MONICA GELLER	T2	586445554	51120	DE510
Employee Count for Agency DE	1	-----		
Employee Count for Company	1	-----		

# Employee Transit Card Report AZ283

Use the **Employee Transit Card Report (AZ283)** to view all active, inactive or both types of cards for the agency.

## Create Report Parameters



1. Type **AZ283** in search field, click **Go**
2. **Job Name:** Type a unique name for the report
3. **Job Description:** Type a detailed description of the report
4. **Company:** Type or select **1**
5. **Agency:** Type or select the two-digit **Agency Code**
6. **Processing Option: Select one below:**
  - **0 Active** View all active cards
  - **1 Inactive** View all canceled cards
  - **2 Both** View all cards
7. Click **Add** to save report parameters. Status bar displays message **Job Added**

## Submit Report

1. Click **Quick Submit**, status bar displays message **Job has been submitted**
2. Click **Print Mgr** to view the report results in your Print Manager

### Demand Reports

#### Example of Report Results

Employee Transit Card Report							
AZ283 Date 06/19/19		Transit Reports					
Time 16:43		For Agency: AD					
Company: 1 STATE OF ARIZONA							
Employee	Name	Transit Card	Date	St	Process Level	Dept	Comment
123456	RACHEL GREEN	1234567899		0	ADHRD	HR120	
234567	JOEY TRIBBIANI	546134864848		0	ADFSR	FR060	
345678	ROSS GELLER	871354685		0	ADHRD	HR140	
456789	PHOEBE BUFFAY	8746456456		0	ADFSG	FG010	
5678910	CHANDLER BING	6434856483586		0	ADHRD	HR110	
					ADFSG	FG060	